



# Entering A Contact: 6 Steps

Fields with \* are required to create your contact.  
Fields with + are required by the state to track data.

Click  **Contacts** at the left of the screen and then select  **New** at the top.

Please note that you do not need to touch any of the fields in the **Record Info** box when entering a contact.

**Basic Info**

Priority Contact or Case ☐ No

First Name \* Minnie

Middle Name ---

Last Name \* Mouse

Preferred Name ---

Date of Birth (DOB) + 3/12/1950

## #1: Basic Info

- First Name\*
- Last Name\*
- Date of Birth+ (necessary for digital outreach)

The **Priority Case or Contact** toggle allows you to flag a contact who is higher priority to receive a phone call. **Check with your supervisor and your local policies to see if you should be using this toggle.**

**Source Case Information**

Ongoing Exposure ☐ No

NC-COVID Event ID of Source Patient #1 + 101454458  
(Use the number ...)

Last Date of Exposure to Source Patient #1 \* 11/18/2020

NC-COVID Event ID of Source Patient #2 101345323  
(Use the number ...)

Last Date of Exposure to Source Patient #2 11/24/2020

## #2: Source Case Information

- Ongoing Exposure (if, for example, your contact lives with a case patient)
- NC-COVID Event ID+
- Last Date of Exposure\*

If you do not have an NC-COVID Event ID, include Source Patient Name and Birthdate.

**Personal Info**

Employer Hermit Crab Inc.

Job Title Builder

Preferred language + English

Other Preferred Language ---

## #3: Personal Info

- Employer (if known)
- Preferred Language+


If "Other" is selected in the **Preferred Language** field, the **Other Preferred Language** field will appear.

Contact Information	
Country Code	---
Primary Phone (will be used for text messages)	1-222-444-6668
Phone #2	1-111-333-5557
Phone #3	---
Email	sandy@castle.com
Preferred Method of Contact	Phone Call

## #4: Contact Information


- Primary Phone *(no country code or dashes needed - this number will be used for automated text outreach if applicable)*
- Email
- Preferred Method of Contact<sup>+</sup>

*If you set Preferred Method of Contact to "Text Message" or "Email," a Primary Phone number or Email will become required.*

Address	
Address Line 1	1000 Hightide Way
Address Line 2	---
City	Shovel
State	* NC - North Carolina
Postal Code	27949
County	*  Nash



## #5: Address

- Address Line 1 *(street address)*
- City
- State\*
- Postal Code
- County\* *(use county of case if not known)*

Demographic Info	
Is Student	<input checked="" type="radio"/> No
 Calculated Age	---
Manual Age (if DOB is not available)	---
Gender	+ Female
Race	+ Prefer not to answer
Ethnicity	+ Not Hispanic or Latino

## #6: Demographic Information

- Is Student *(if known)*
- Manual Age *(if no DOB)*
- Gender<sup>+</sup>
- Race<sup>+</sup>
- Ethnicity<sup>+</sup>

**Save your work**  Save to finish. If needed, you can then use **"Assign"**  Assign at the top of the screen and single-click "Me" to input a "User or Team" and assign this contact to them. **You're all done!**